



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Scheduled Report - public distribution

Date: 11/15/1999

GAIN Report #EZ9025

Czech Republic

Exporter Guide

1999

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Report Highlights: Marketing and contact information for U.S. exporters of agricultural products who are interested in doing business in the Czech Republic.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
Vienna [AU1], EZ

SECTION I. MARKET OVERVIEW

Economic Situation

The Czech Republic is currently recovering from a severe economic recession. The economy contracted by nearly three percent in 1998, as unemployment rose and inflation slowed. After a 4.1% contraction in the first quarter of last year, and four straight quarters of negative growth in 1998, government and consumer spending have brought the Czech Republic out of economic decline. The second quarter GDP was predicted to fall by one percent but actually rose by 0.3%. The roots of the economic decline lay in unfinished structural reforms that were started as part of the transition to a full market economy; namely, privatization, judicial reform, modernization of the commercial code, and enhanced transparency in the government's economic decision-making.

	1996	1997	1998	1999 (est.)
GDP (in bill. \$, current prices)	46.77	40.42	55.00	54.00
Real GDP growth rate (in %)	3.9	1.0	2.7	-1.0
GDP per capita (in \$)	4541	3925	5500	5500
State budget/GDP (in %)	31	30	29	32
Inflation (in %)	8.8	8.5	10.7	5.0
Unemployment (in %)	3.5	5.2	7.5	10.0
Exchange rate to \$1 (in CZK)	27.14	31.71	32.27	35.47

Source: Czech National Bank, Ministry of Finance

The Czech Role in the Region's Economy

The Czech Republic's central location makes it an excellent hub for transshipment to other member states of the Central European Free Trade Agreement¹, Russia, the NIS and Europe. Integrating the Czech economy into the West, specifically into the EU, remains a government priority. The Czech Republic began negotiations on EU accession in March 1998 and has set a target of 2003 to be prepared for EU entry. In practice, this means harmonizing Czech laws and standards with those of the EU. In the meantime, the Czech Republic benefits from access to EU markets under an Association Agreement with the EU.

Upgrading the nation's infrastructure, especially telecommunications and transportation, is critical for continued economic growth and development. The quality of the Czech transportation network is generally below western European standards and all of the transport sectors, including railway, highway, inland waterway and air, are being upgraded. Projects currently include a \$3.5 billion modernization of the rail system (with priority being giving to the Czech section of the Berlin-Prague-Vienna line); a plan to modernize and extend the country's highway network; and plans to expand the use of the river transport system for containerized cargo.

¹ Czech Republic, Hungary, Poland, Slovakia, Slovenia, Bulgaria and Romania

The effects of the economic situation on sales of U.S. products

Due to unfavorable economic conditions, demand for luxury products has declined and in many instances price has become the most important purchasing factor. However, there is a niche market for some high quality U.S. products, which are listed in Section IV.

On a cumulative basis, the United States is the third largest investor in the Czech Republic, behind Germany and the Netherlands. Among the American food companies that have established their offices in the Czech Republic are: Coca Cola, Pepsi Cola, Sara Lee, Kraft, Philip Morris, R.J. Reynolds, Heinz, Kroger, Master Foods, McDonald's, Kentucky Fried Chicken, Pizza Hut, American Grill and others. The following table shows imports of major agricultural and food products from the U.S. during the first eight months of 1999:

HTS Number	Item	Jan-Aug/1999	
		In 1000 MT	In mil. CZK
0712	Dried vegetables	278	20
0173	Dried leguminous vegetables	23	2
0801	Coconuts, Brazil nuts and cashews	22	3
0802	Other nuts	406	60
0806	Grapes, fresh or dried	75	4
0813	Dried fruit	365	19
1005	Corn	85	2
1006	Rice	1,203	16
1201	Soybeans	41	0.7
1202	Peanuts	48	1
1206	Sunflower seeds	456	17
1511	Palm oil	121	2
1702	Other sugars, incl. glucose and fructose, sugar syrups, artificial honey	342	8
1703	Molasses	232	1
1905	Bread, pastry and other bakers' wares	93	6
2008	Fruit preserved and otherwise prepared	408	35
2009	Fruit and vegetable juices	142	9
2103	Sauces, mixed condiments and mixed seasonings	75	5

2106	Food preparations not elsewhere specified	1,242	254
2204	Wine of fresh grapes, fortified wines	21	2
2208	Spirits, liqueurs and other distilled beverages	847	86
2303	Residues of starch and sugar manufacture, brewing or distilling dregs and waste	99	1
2309	Petfood	569	29
2401	Unmanufactured tobacco	2,238	670
2402	Cigars, cigarillos and cigarettes	34	17
4104	Leather of bovine or equine animals	487	294
4407	Wood sawn or chipped lengthwise	1,058	55
4408	Veneer sheets and sheets of plywood	631	57
5201	Cotton not carded or combed	618	54

Demographic Developments and Their Impact on Consumer Buying Habits

The number of single households and childless couples is on the rise. The main reasons for this trend are that young people are waiting longer before they have children and women increasingly take more demanding or professional jobs. The result is higher demand for convenience products and frozen foods. Recently, even fresh chilled ready-made meals have become popular. Additionally, along with the boom in hypermarkets and larger home refrigerators, once-a-week food shopping is quickly replacing daily purchases of fresh food items.

Food Expenditures

Per capita food consumption in the Czech Republic in 1998 was 19,847 CZK. The following table shows food expenditures in CZK of households by social group:

	1996	1997	1998
Employees	17,149	18,268	19,598
Self-employed	17,859	18,938	19,538
Farmers	14,684	15,832	16,722
Retired	19,957	21,759	22,531

Source: Czech Statistical Yearbook

Advantages and Challenges for U.S. Suppliers on the Czech Market:

Advantages	Challenges
There has been a boom in large hypermarkets that carry up to 30,000 food items.	Current economic situation in the Czech Republic
The growth in the number of fast food restaurants (McDonald's, Pizza Hut, KFC), more expensive restaurants (TGI Friday's, American Grill) and bars serving food.	Czech importers usually do not import directly due to small quantities - they tend to purchase through European brokers and this increases costs and retail prices.
Fish consumption is relatively low (it is a landlocked country) but fish products are readily accepted by consumers. This represents a good opportunity for U.S. exports of smoked salmon, live lobsters and other seafood.	The distance to this market may make shipping some items uncompetitive.
Interest and willingness of Czech consumers to try new food products.	During the last year, the U.S. dollar appreciated by 10% against the Czech Koruna.
In-store promotions are considered to be a cost effective way to introduce or promote products.	The Czech Republic is harmonizing its legislation with the EU and the sale of products containing GMO's may one day be highly restricted.
Great number of European and American tourists - Prague is the second most visited city in Europe after Paris. Visitors often buy foods they are familiar with and Hotel, Restaurant, and Institution (HRI) sales represent an opportunity.	Decreasing population (by 0.2% each year since 1994).

SECTION II. EXPORTER BUSINESS TIPS

Local Business Customs

The Czech system of duties imposed on imports is very transparent and stable and the customs system generally respects the country's obligations in the WTO. Agricultural products, which are considered 'sensitive' commodities in the Czech Republic, are protected by higher tariffs ranging from 50 percent to 200 percent. But in order to preserve competition on the Czech market and expand range of products, some kinds of goods can be imported at lower tariffs within tariff rate quotas (TRQ). These quotas are set for one calendar year and are used automatically until they are exhausted.

Information regarding the fill rate of a particular TRQ is published regularly and can be found on the Internet at: www.cs.mfcr.cz. TRQs are generally administered on an MFN basis (i.e. they are not earmarked for a specific country). TRQs apply to the import of the following commodities: live bovine animals, meat of bovine animals, live swine, meat of swine, live sheep, mutton, poultry, meat of offal, milk and cream, yoghurt, butter, potatoes, fresh grapes, wheat, barley, corn, starches, rape seeds, sunflower seeds, sunflower oil, rape oil, margarine, glucose, pasta, ice cream, waters containing added sugar, sparkling wine, wine of grapes, ethyl alcohol, spirits, dextrins and other modified starches, cane molasses, sugar beet molasses.

The Czech Republic has two VAT rates: 5% on foodstuffs, and 22% on tobacco, alcoholic beverages, seafood, and public catering. In addition to the VAT, some products are subject to excise tax. The following list shows the 1999 rates for selected products:

cigarettes over 70 mm	0.74 CZK/piece
beer	24 CZK/hectoliter for each percent of original malt extract (e.g. 10% beer = 240 CZK, 12% beer = 288 CZK)
alcohol and spirits	234 CZK/liter
grape wines	2.5 CZK/liter
fortified wines	16.40 CZK/liter
sparkling wines	23.40 CZK/liter

A listing of the product categories subject to excise taxes was published in the government's Excise Tax Act No. 587/92, a copy of which may be obtained through the American Embassy in Prague.

General Consumer Tastes and Preferences

The following are trends and points to consider with regard to Czech consumer tastes and preferences:

- Typical Czech cuisine is quite heavy, usually consisting of meat with a sauce and dumplings. Traditionally, there has been a relatively high level of red meat consumption and a low level of vegetable consumption. There is, however, a trend toward healthier eating which includes lighter meals and international cuisines. This is accompanied by an increase in the consumption of fruits, vegetables, fish, poultry, vegetable oils and margarine.
- Fish consumption is relatively low in comparison with meat consumption. However, fried carp is a widespread and traditional Christmas Eve dish.
- Organic foods are available in supermarkets and specialized stores but there is not yet a significant consumer preference for these goods.
- With arrival of international retail chains, ethnic cuisines (e.g., Tex-Mex) are becoming more well known and more popular.

The following table shows consumption of various kinds of foodstuffs in 1996 (more current data are not yet available from the Czech Statistical Office).

Item	Consumption in kg per capita in 1996
Meat total	85.3
out of which: Pork	49.2
Beef	18.2
Veal	0.3
Poultry	13.6
Fish total	5.2

Fats and oils	22.8
Vegetable edible fats and oils	15.8
Milk and milk products	199.2
Eggs (pieces)	276
Cereals	149.8
Wheat flour	87.0
Pasta	4.5
Rye flour	18.6
Bread	58.4
Rice	5.0
Sugar	39.5
Potatoes	77.2
Pulses	2.0
Vegetables	79.5
Fruit	73.5
Alcoholic beverages (pure ethanol) and spirits	17.5
Beer	157.3
Wine	15.8
Non-alcoholic beverages	127

Food Standards and Regulations

Food Law no. 110/97 came into force in January 1998, establishing basic rules for food production in the Czech Republic. It is available in English on the Internet: www.czpi.cz. The law has been amended by several decrees, including those concerning the treatment of certain product classes (e.g., frozen products, meat and fish, dried fruits and nuts, tobacco, fresh fruits and vegetables, sweeteners, non-alcoholic beverages, coffee and tea) and food safety (the special treatment of foodstuffs (radiation), microbiological requirements, etc).

The Czech Republic currently has no legislation that specifically addresses genetically modified organisms

(GMOs). A draft bill on GMOs was approved in April 1999 and is currently being debated within the government. Ultimately, the Czech Republic will likely follow the EU's lead concerning legislation on GMOs.

General Import and Inspection Procedures

In general there are no special requirements for imported products. All imported products must comply with Czech food safety regulations (Food Law 110/97 along with the relevant decrees). Products of animal origin are subject to certification and the State Veterinary Administration has specific requirements for importing poultry, beef, pork, horse meat, and fish products. These products must be accompanied by the appropriate U.S. Department of Agriculture Food Safety and Inspection Service (FSIS) certificate. Fresh/frozen red meat and poultry are not eligible for export from the U.S. at this time because additional certification requirements for Salmonella and residues cannot be met (go to <http://www.fsis.usda.gov/OFO/export/explib.htm> for a current listing of certification requirements).

A new veterinary law (no. 166/1999), which came into force on September 28, 1999, introduces administrative fees for veterinary checks on animals, animal products, and fodder imported into the Czech Republic. The fee for a veterinary check of one metric ton of live animals is 170 CZK. The fee for one metric ton of animal products and fodder is set at 110 CZK. The minimum fee per consignment is 1,120 CZK and the maximum 11,900 CZK.

The Czech Agricultural and Food Inspection Service (CZPI) is the government organization that regulates food safety for products that have already been imported and are being presented for sale in stores, in restaurants etc. CZPI inspects the quality of foodstuffs, shelf life, expiration dates, prices and other characteristics.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

The Food Retail Sector

The following are trends and points to consider in the Czech food retail sector:

- The total turnover in the food retail sector including sales of alcoholic beverages and tobacco is estimated around 10 billion USD a year.
- In the last few years there has been considerable concentration in the food retail sector, especially with a boom in hypermarkets (defined here as a store with floor space exceeding 2,500 square meters; however, in larger cities there are hypermarkets over 10,000 square meters). Currently there are about 30 hypermarkets in the Czech Republic and retail sector experts believe that within a few years there will be as many as 100 hypermarkets in the country. At that time about ten percent of all retail consumer expenditures will be spent in hypermarkets.
- The concentration is driving small retailers out of the market. On the other hand, hypermarkets have raised the level of service and professionalism in the sector. They offer home deliveries, longer opening hours (usually 9am - 9pm), as well as other services.
- Competition and the strong purchase power of large retailers have kept down retail prices, which has contributed to lower inflation.
- Large international retail chains (the U.K.'s Tesco, the Dutch Ahold, Germany's Globus and Kaufland, the French Carrefour, Belgium's supermarket chain Delvita, and Austria's Julius Meinl) have centralized

buying departments, usually at the corporate headquarters. Purchasing agents are usually specialized by category of products (meat, fish, bakery, dairy, produce, dry products, canned products, beverages etc.).

- Walmart plans to enter the Czech Republic sometime next year through acquisition of an existing retail chain.
- The range of food products in retail outlets includes both domestic and imported products. The larger and the more international a company is, the more imported products it carries.
- The new hypermarkets have increased the consumption of fish and seafood products since most of them have large departments with fresh fish and seafood, including live fish in water tanks. Before that, fresh fish was available only in small specialized stores, out of which only the best ones still exist.
- Competition in the retail sector is getting stronger and stronger and in order to gain more market share, companies are cutting their costs significantly.
- The best market entry approach is to find a local importer/distributor who is already established in the large retail chains. Retailers usually do not like to import directly. The only exception is the hypermarket chain Tesco, which imports directly from the U.S. through a wholesale company out of New Jersey called Wakefern (Tesco bought K-mart three years ago and has since had and increased business presence in the United States).
- There are many tourists and expatriates in the Czech Republic, especially in the capital city, Prague. They come mainly from Germany, Austria, U.S., Italy, and France. They like to shop in large supermarkets and hypermarkets and often purchase familiar international products.
- The large retail chains put a lot of emphasis on marketing and promotion, including big sales after the holidays, constant promotion of certain products supported by flyers, tastings of products etc. (Note: The U.S. Embassy in Prague will help to organize in-store promotions.)

The Hotel, Restaurant, and Institution (HRI) Sector

The following are trends and points to consider in the Czech HRI sector::

- The total turnover in HRI food service sector is estimated at around 8 billion USD a year.
- The trend towards concentration in the retail grocery sector has just started in the HRI sector. This sector is comparatively untapped.
- About 80% of restaurants and institutions prepare meals themselves and buy ingredients from various suppliers, since there are no wholesaler specializing in the HRI sector. About ten percent of HRI establishments purchase ready meals from international caterers (e.g. Sodexho, Eurest, GTH etc.). Another ten percent purchase from domestic companies.
- According to Sodexho, one of the major catering companies in the Czech Republic specialized in institutional catering, about half of their turnover comes from sales to organizations with cafeterias for their employees, the other half comes from state owned institutions (schools, hospitals).
- Catering companies do not import directly, but through large importers and wholesalers.
- There is a trend toward healthier eating, which means that typically heavy Czech cuisine is being substituted with various lighter international cuisines (Italian, French, Chinese, Indian, and Mexican restaurants are becoming more popular) and more fruits and vegetables are being made available.
- Fast food restaurants were quickly established after the political changes in 1989 and several American firms are well established and successfully operating in the Czech Republic (e.g. McDonald's, Pizza Hut, Kentucky Fried Chicken, etc.).

The Food Processing Sector

The following are trends and points to consider in the Czech food processing sector:

- The total turnover in food processing sector is around 7 billion USD a year.
- With almost twenty percent of total industrial output, food processing is one of the most important sectors of the Czech economy. Production of pasta, cheese, and vegetable oils have seen the largest growth.
- Most food processing companies have been privatized, with the exception of several strategic companies (e.g. Budejovický Budvar which produces Czech Budweiser Beer). State owned companies have a small and declining share of the food processing industry.
- The structure of ownership for privatized food processing companies is as follows: public shareholding companies (64%), limited companies (30%), other (6%).
- While most of food processing companies are Czech-owned, some have been bought by large international companies (e.g. Tabak is owned by Phillip Morris, Cokoladovny by Nestle, Plzensky Prazdroj by the Japanese investment company Nomura, and Prague Breweries by British Bass).
- In order to compete with international exporters of food products, Czech companies are concentrating production efficiency, cutting surplus capacity, and improving equipment and technology. These structural changes are being facilitated by vertical integration through cooperation among processors in related industries, such as malt houses with breweries, grain mills with bakeries, and livestock producers with meat, poultry, and dairy processors.

The following table show the structure of food processing companies by number of employees in 1997:

Number of employees	Number of companies
20 - 49	469
50 - 99	197
100 - 299	261
300 - 499	57
500 - 999	20
1000 - 1999	8
2000 and over	5

Among the largest food producers and processors are: Tabak - Philip Morris (tobacco), Plzensky Prazdroj (beer), Cokoladovny (candy), Budejovický Budvar (beer), Setuza, Milo Olomouc (vegetable oils), Kostecke uzeniny, Masokombinat Martinov (meat processing plants), Jan Becher (liquor), Jihoceske mlekarny, Olma, Danone (dairy products), Bohemia Sekt (sparkling wine), Unilever (margarine, ice-cream), Vitana (dried soups), Bohemia Chips (potato chips).

The following table shows the number of companies in 1997 by category and industry share (based on turnover):

Production/Processing of:	Number of companies in 1997	Share of turnover in food industry in %

Meat and meat products	185	20.5
Fish	6	0.5
Fruit and vegetables	41	2.6
Vegetable and animal origin fats and oils	5	5.2
Dairy products	77	15.0
Grain and starch	45	3.7
Livestock feed	56	6.1
Other foods	448	27.8
Beverages	154	18.6
Total	1,017	100.0

SECTION IV. BEST HIGH-VALUE PRODUCT PROSPECTS

The following high value products are considered to have good market prospects:

Almonds
Cake mixes
Citrus
Distilled liquor
Dried prunes
Frozen meals
Juice concentrates
Live lobster
Peanuts, peanut butter
Raisins
Rice, wild rice, rice mixes
Sauces and salsa
Smoked salmon
Tex-Mex products
Tobacco products
Wine

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

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Our local web page: <http://www.usembassy-vienna.at/usda/>
USDA FAS web page: <http://www.fas.usda.gov>

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Exchange rate note: in November 1999, 1 US Dollar = approximately 35 Czech Koruna (1 Czech Koruna (CZK) = 0.028 US Dollars)

Appendix I.

TABLE A: KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries (\$Mil)/U.S. Market Share(%)	1998	2,026 / 5%
Consumer Food Imports From All Countries (\$Mil)/U.S. Market Share(%)	1998	1,068 / 2%
Edible Fishery Imports From All Countries (\$Mil)/U.S. Market Share(%)	1998	80 / .07%
Total Population (Millions)*/Annual Growth Rate (%)*	1999	10.3 / -.1%
Urban Population (Millions)*/Annual Growth Rate (%)*	1999	7.7 / .2%
Number of Major Metropolitan Areas	1999	1
Size of the Middle Class (Millions)/Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)	1998	\$5,500
Unemployment Rate (%)**	1998	10%
Per Capita Food Expenditures (U.S. Dollars)	1998	\$600
Percent of Female Population Employed**	1997	47%
Exchange Rate (US\$1 = X.X local currency)***	11/15/99	35.03

* denotes information collected from www.cia.gov

** denotes information collected from www.worldbook.org

*** denotes information collected from <http://quote.yahoo.com>

Appendix II.

Czech Republic Imports

(In Millions of Dollars)

	Imports from the World			Imports from the U.S.			U.S. Market Share		
	1995	1996	1997	1995	1996	1997	1995	1996	1997
CONSUMER-ORIENTED AGRICULTURE	1,014	1,126	987	11	17	20	1	1	2
Snack Foods (Excl. Nuts)	101	114	104	1	1	1	0	0	0
Breakfast Cereals & Pancake Mix	8	6	8	1	1	1	0	1	2
Red Meats, Fresh/Chilled/Frozen	21	19	13	1	1	1	1	1	0
Red Meats, Prepared/Preserved	19	21	16	0	0	1	0	0	0
Poultry Meat	16	19	20	0	1	1	0	0	0
Dairy Products (Excl. Cheese)	26	36	34	1	0	1	0	0	0
Cheese	38	46	28	0	0	0	0	0	0
Eggs & Products	5	8	7	1	1	2	14	16	29
Fresh Fruit	195	227	181	1	1	1	0	0	0
Fresh Vegetables	118	115	94	1	1	1	0	0	0
Processed Fruit & Vegetables	106	113	98	4	3	4	3	3	4
Fruit & Vegetable Juices	42	48	42	1	1	1	0	0	1
Tree Nuts	16	20	27	2	4	4	12	21	16
Wine & Beer	24	34	36	1	1	1	0	0	0
Nursery Products & Cut Flowers	34	39	36	1	1	1	1	1	1
Pet Foods (Dog & Cat Food)	6	8	8	1	1	1	1	1	1
Other Consumer-Oriented Products	240	251	235	4	6	8	2	2	3
FISH & SEAFOOD PRODUCTS	73	85	78	1	1	1	0	0	0
Salmon	1	2	2	1	1	1	13	19	9
Surimi	6	6	9	0	0	0	0	0	0
Crustaceans	1	2	2	0	1	1	0	0	0
Groundfish & Flatfish	24	30	20	1	1	1	0	0	0
Molluscs	1	1	1	0	0	0	0	0	0
Other Fishery Products	39	45	44	1	1	1	0	0	0
AGRICULTURAL PRODUCTS TOTAL	1,914	2,132	1,935	58	66	90	3	3	5
AGRICULTURAL, FISH & FORESTRY TOTAL	2,173	2,408	2,226	62	72	99	3	3	4

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

CONSUMER-ORIENTED AGRICULTURAL TOTAL - 400

Reporting: Czech Republic - Top 15 Ranking

	Import	Import	Import
	1996	1997	1998
	Value	Value	Value
	1000\$	1000\$	1000\$
Germany	153336	110371	137542
Spain	84896	89135	92498
Slovakia	113947	91773	82579
Italy	92151	77502	80238
Poland	36994	54326	80090
Netherlands	82359	63773	79633
Hungary	61290	62722	68617
France	76805	59070	56869
Austria	66113	44025	55354
Colombia	30151	25324	43710
Belgium	26987	19337	30481
Denmark	18218	12815	24978
Greece	18737	17823	20202
United States	16844	19581	19632
Brazil	12558	11262	18277
Other	234887	227727	177472
World	1126335	986626	1068252

FISH & SEAFOOD PRODUCTS - 700

Reporting: Czech Republic - Top 15 Ranking

	Import	Import	Import
	1996	1997	1998
	Value	Value	Value
	1000\$	1000\$	1000\$
Germany	17239	16252	14598
China (Peoples Republic of)	2540	4227	9562
Poland	5827	7636	7702
Denmark	5236	5489	7214
Thailand	4436	4278	4911
Croatia	5082	4508	3994
Netherlands	4256	3621	3647
Norway	6721	5329	3466
Spain	3504	2756	2846
Russian Federation	432	2615	2149
Ireland	1989	1529	2082
Italy	1637	1528	1972
France	669	1213	1839
Estonia	1240	1180	1825
Peru	6627	3105	1276
Other	18029	12884	11230
World	85474	78158	80333

Source: United Nations Statistics Division